



International Trends in Clothing and Textile Industries

South Africa's Manufacturing Subsectors: Findings From
TIPS Research

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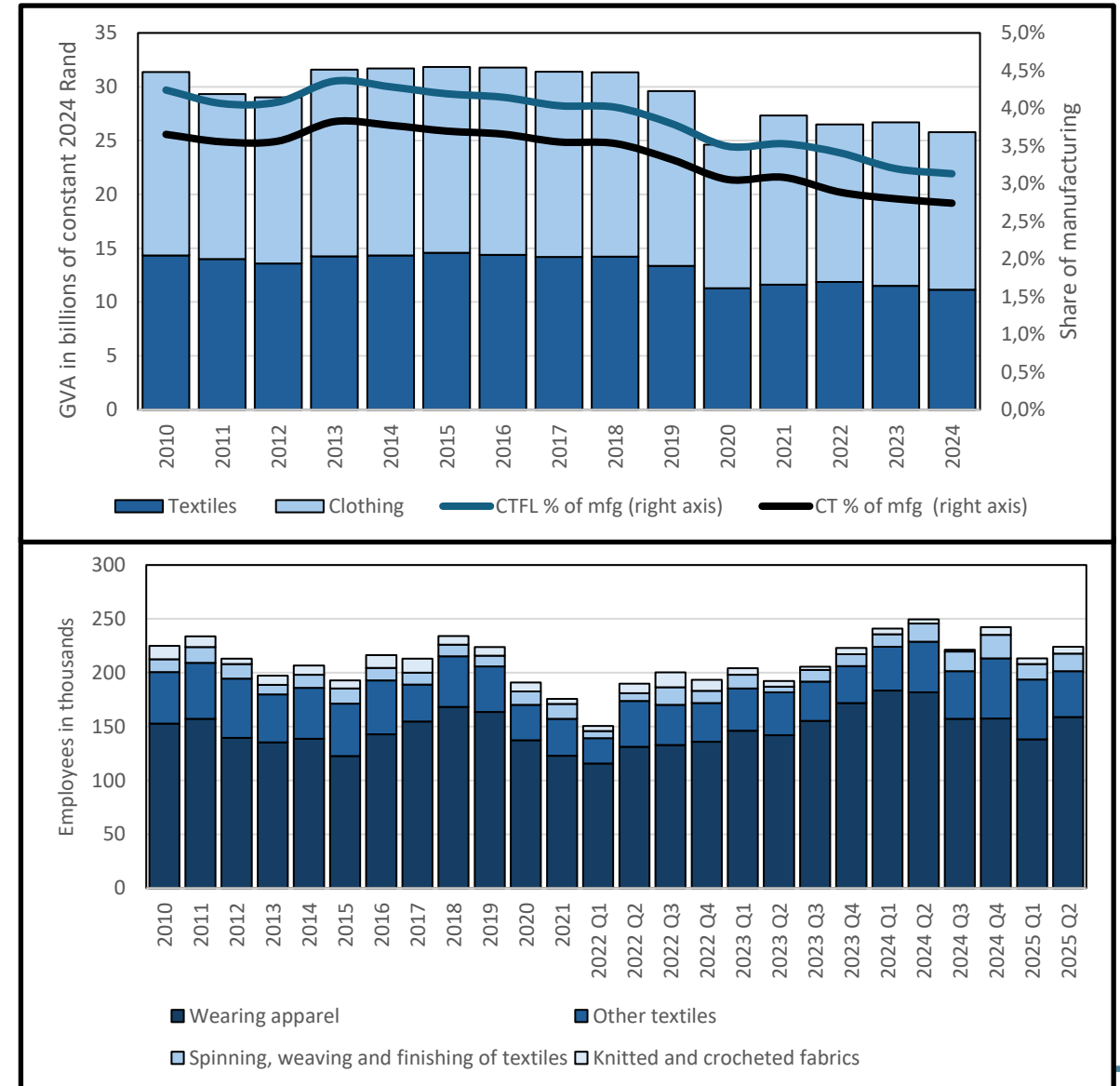
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Outline

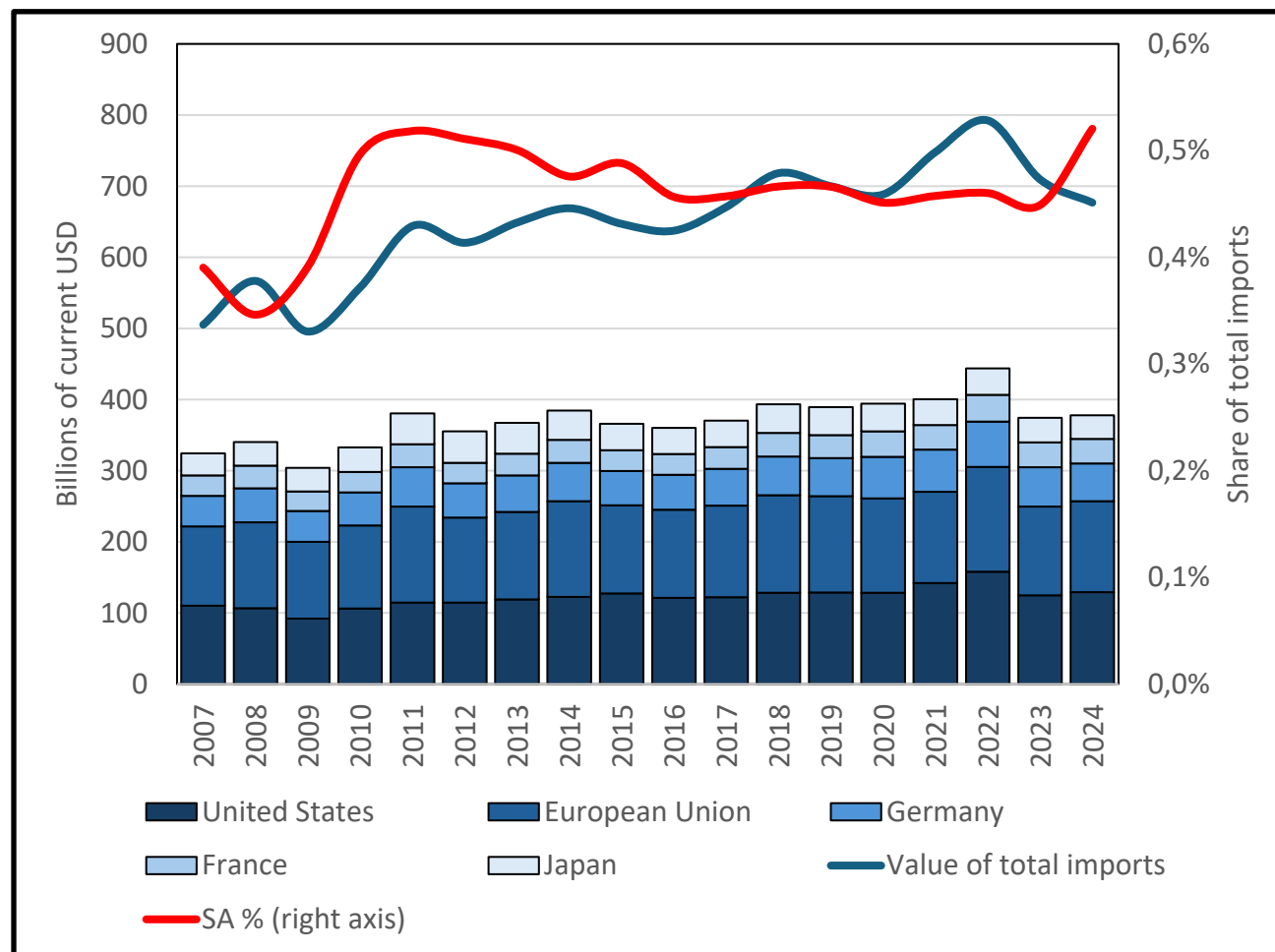
- Industry overview
- Global imports
- Global exports
- South African imports
- South African exports
- US tariffs
- FDI
- Key takeaways

Industry overview

- Clothing and textile industries contribute 2.7% to manufacturing GVA.
 - CTFL contributes 3.1%.
- Clothing and textile industries employed 224 000 people in the second quarter of 2025.
 - CTFL employed 259 000 people.
- South Africa is a net importer of clothing and textiles.
- The clothing and textiles value chain is buyer-driven and mainly led by retailers.
- The industries are supported through the Retail-Clothing, Textiles, Leather and Footwear Masterplan.

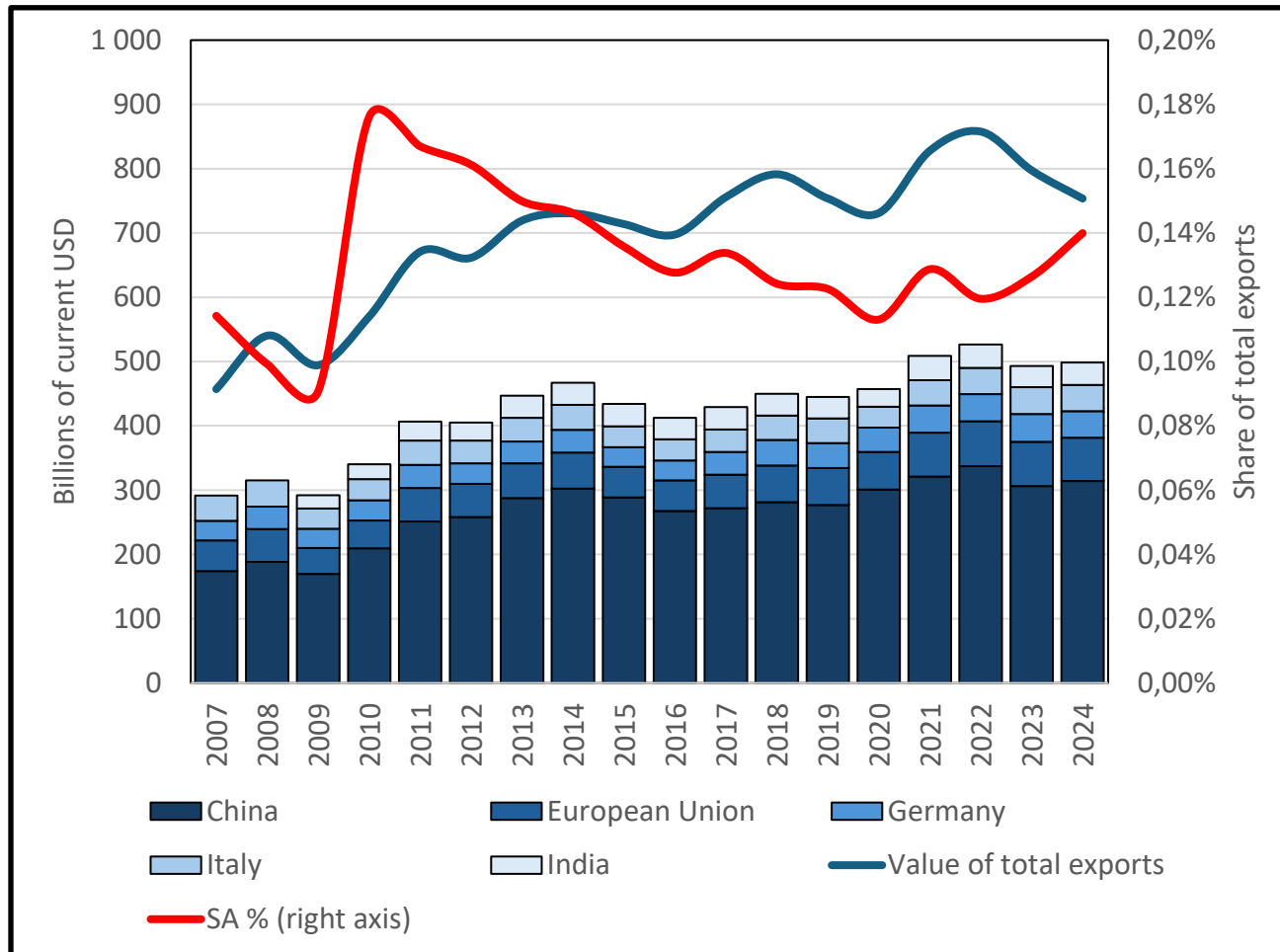


Global imports



- Global imports of clothing and textiles amounted to US\$677 billion in 2024.
- Top importers include:
 - United States – 19%
 - European Union – 19%
 - Germany – 19%
 - France and Japan – 5%
- South Africa accounted for 0,5% of global imports.
- Top imported products:
 - Men's or boys' shirts, trousers, nightwear, underwear and neckwear and females' and infants' knit shirts.
 - Women's, girls', and infants' dresses, blouses, coats, suits and shirts.
 - Men's or boys' suits and coats.

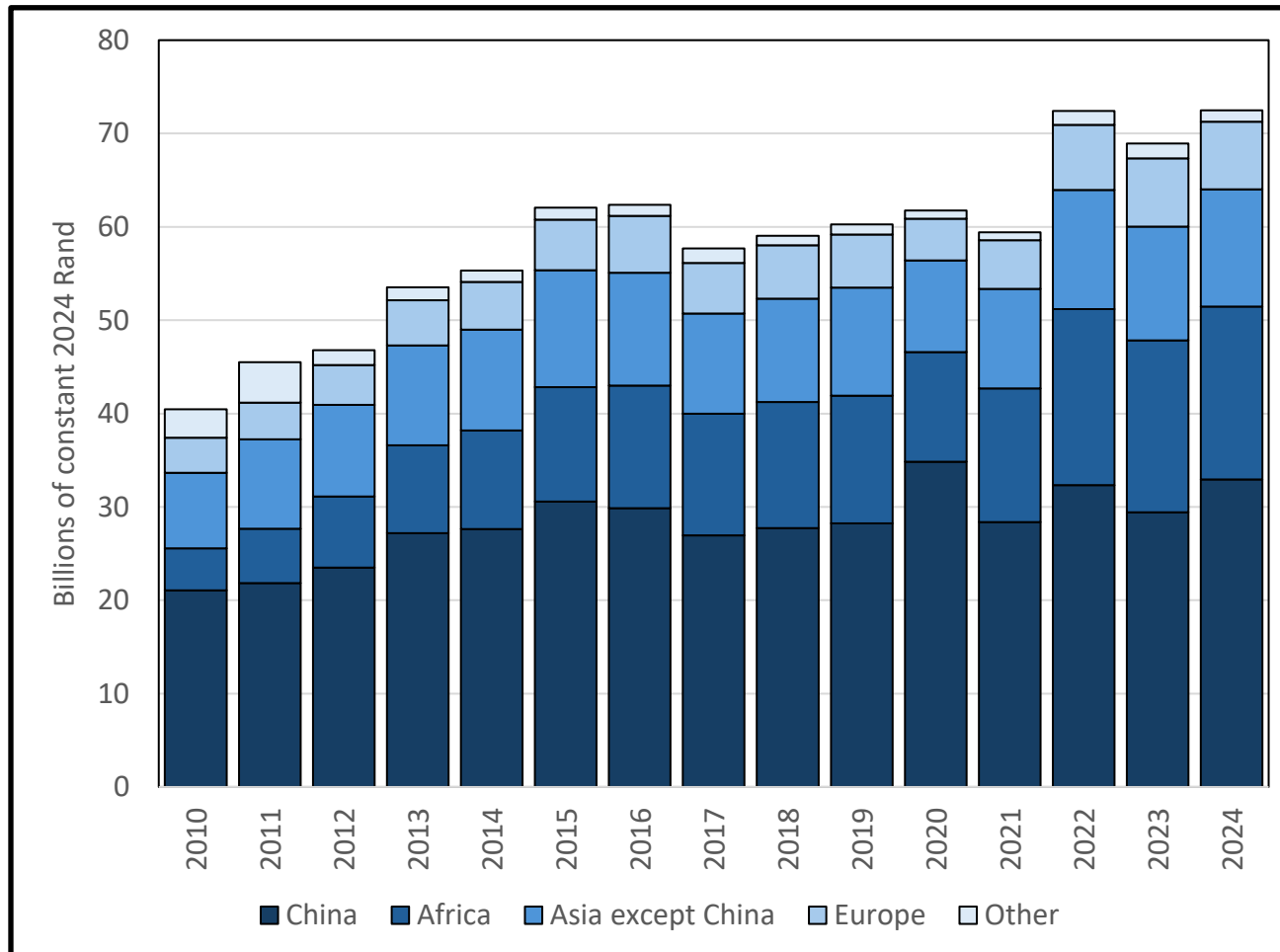
Global exports



- Global exports amounted to US\$754 billion in 2024.
- Top importers include:
 - China – 42%
 - European Union – 9%
 - Germany, Italy, and India – 5%
- South Africa accounted for 0.14% of global exports.

South Africa's imports

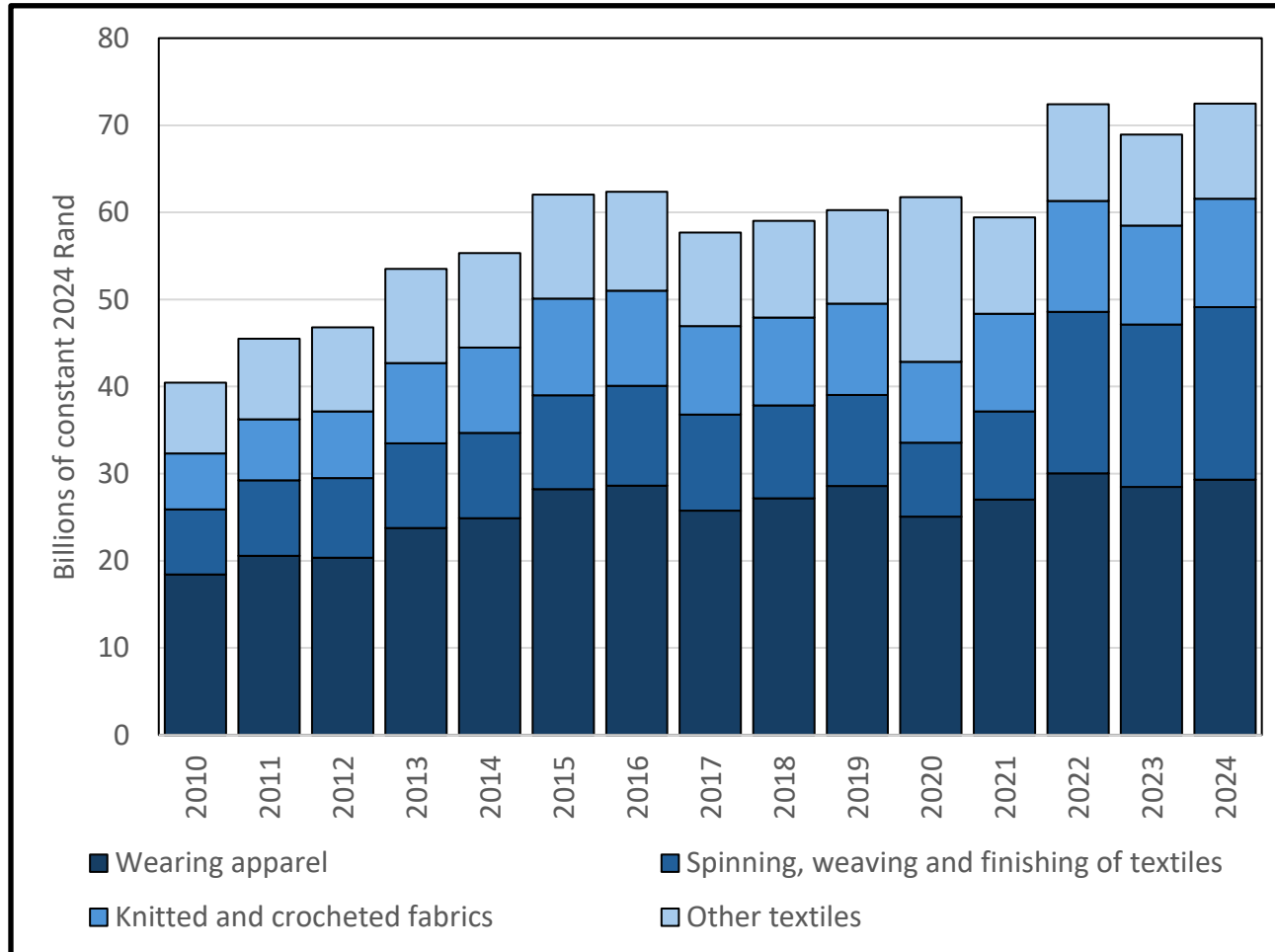
by major trading partner



- South Africa's clothing and textiles imports amounted to R72 billion in 2024.
- Major import sources in 2024 included:
 - China – 45%
 - African countries – 25%
 - Other Asian countries – 17%
 - European countries – 10%

South Africa's imports

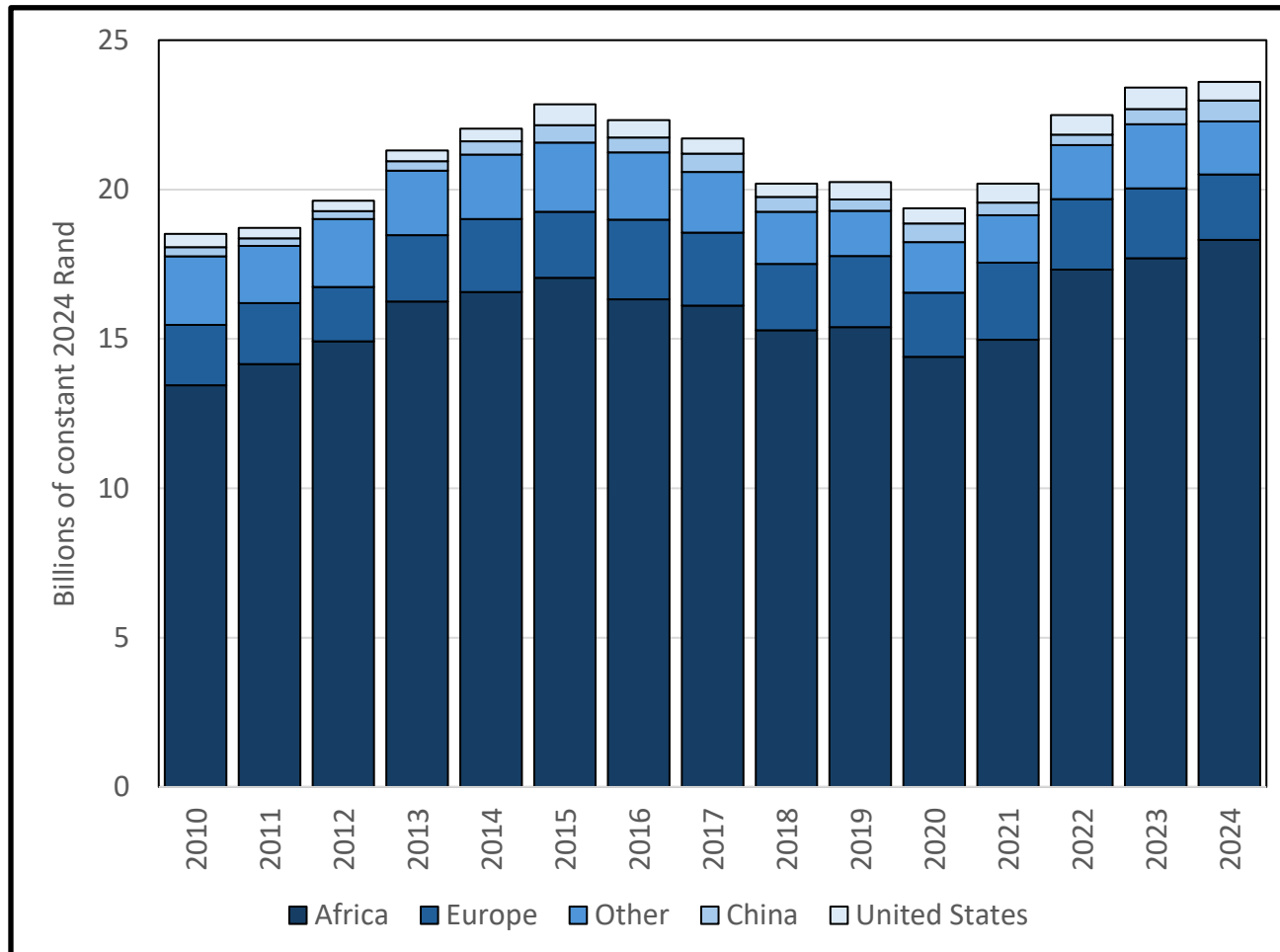
by product



- Wearing apparel
 - Sourced from China (48%), Eswatini (11%), Mauritius (6%), Madagascar (6%), Bangladesh (5%) and India (4%).
- Spun, woven and finished textiles
 - Sourced from China (40%), Eswatini (18%), the European Union (11%) and Switzerland (7%).
- Knitted and crocheted fabrics
 - Sourced from China (51%), Madagascar (11%), Mauritius (8%), Bangladesh (5%), and India (4%).
- Other textiles
 - Sourced from China (42%), European Union (18%), SACU excl. SA (12%), and India (11%).

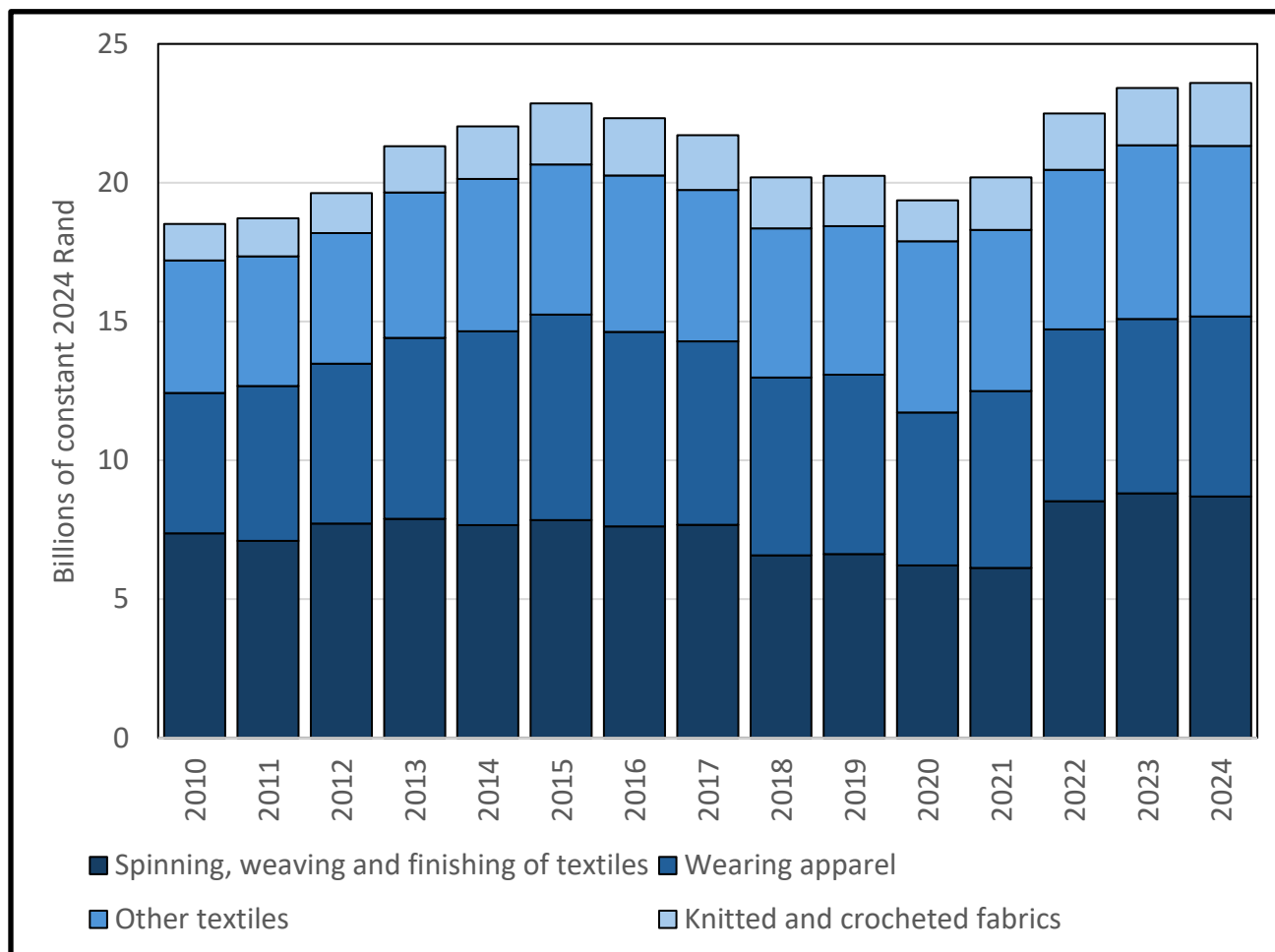
South Africa's exports

by major trading partner



- South Africa's clothing and textiles exports amounted to R24 billion in 2024.
- Major export destinations:
 - African countries – 78%
 - European countries – 9%
 - China – 3%
 - United States – 3%

South Africa's exports by product

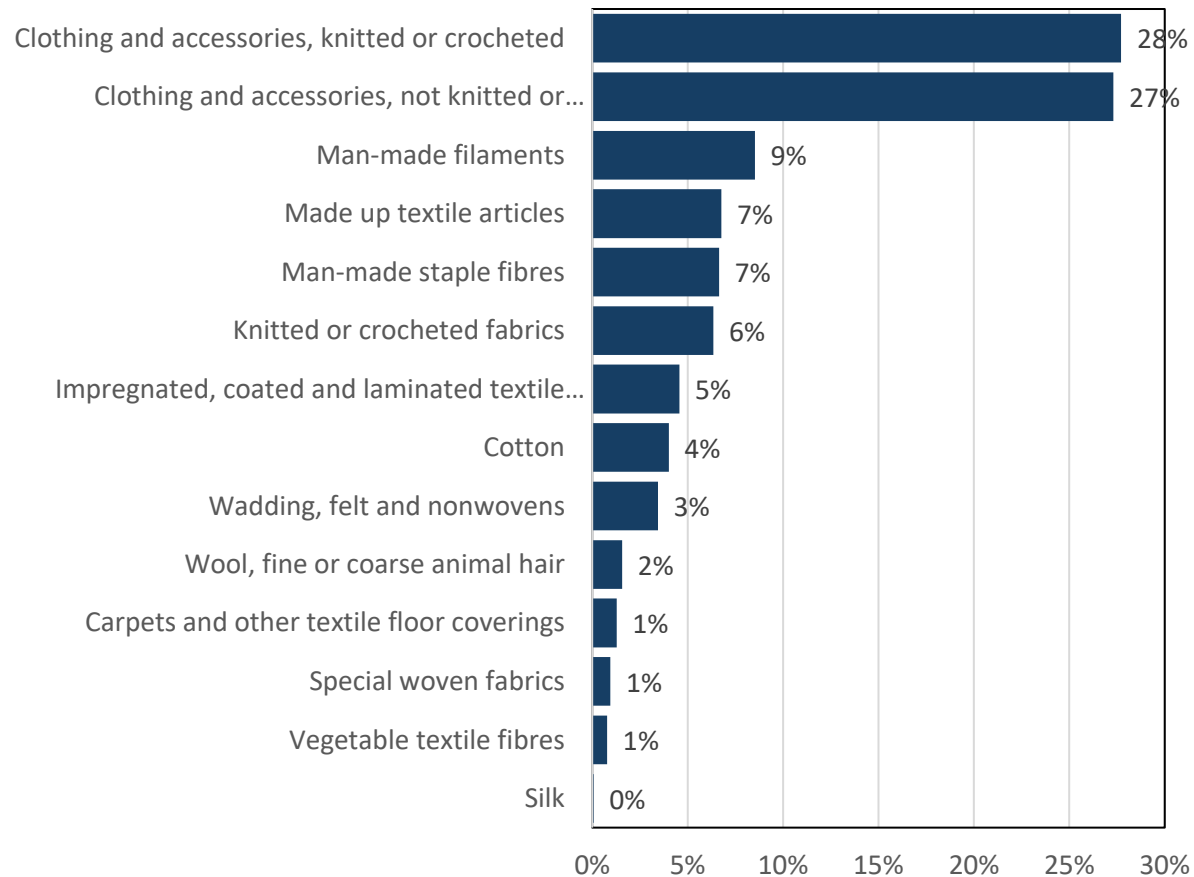


- Spun, woven and finished textiles
 - Exported to Namibia (12%), Lesotho (10%), Eswatini (9%), the DRC, Zambia, Botswana, Mozambique, China, Italy, Zimbabwe and Australia.
- Wearing apparel
 - Exported to Namibia (32%), Lesotho (10%) and Eswatini (10%).
- Other textiles
 - Exported to Namibia (17%), Botswana (12%), Lesotho (9%), France, Zimbabwe, Mozambique, Eswatini, Zambia, Australia, and the DRC.
- Knitted and crocheted fabrics
 - Exported to Namibia (24%), Botswana (19%), Eswatini (15%), and Lesotho (11%).

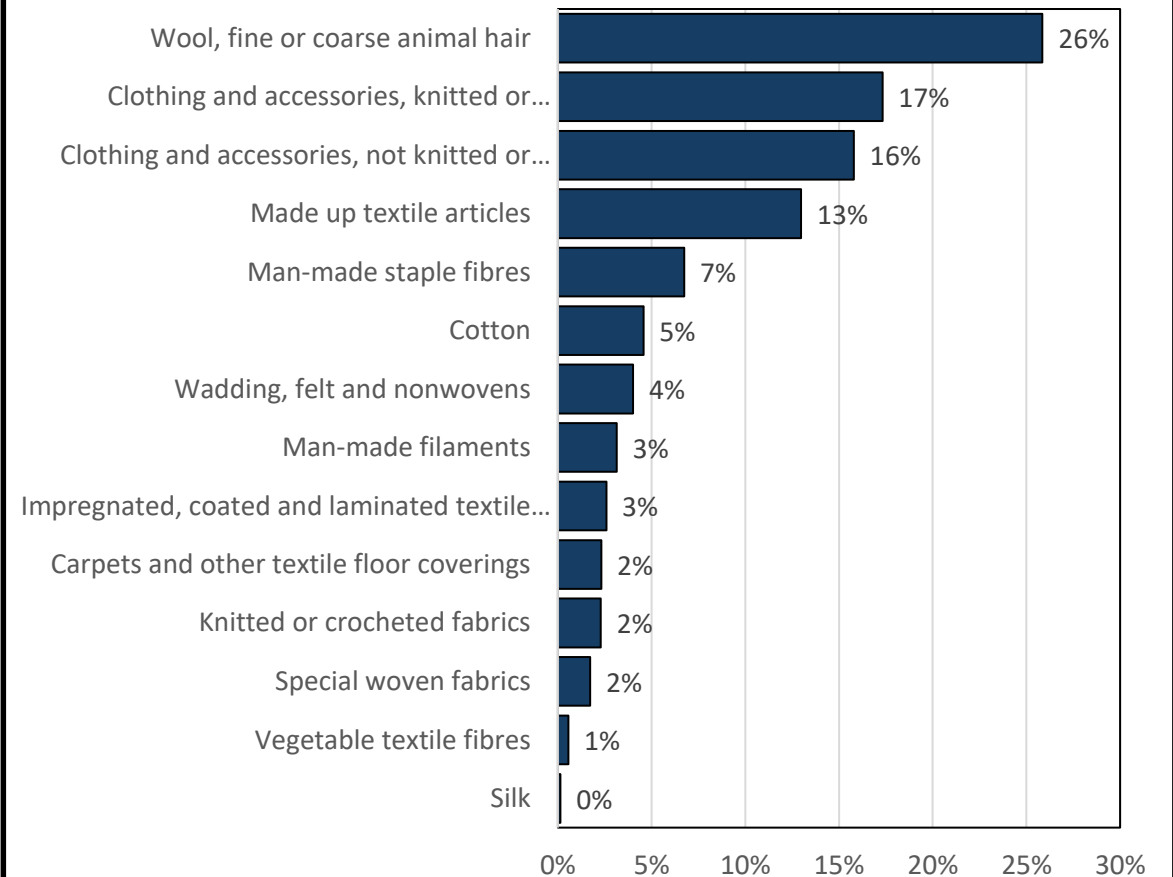
South Africa's trade by product

Share of trade by product

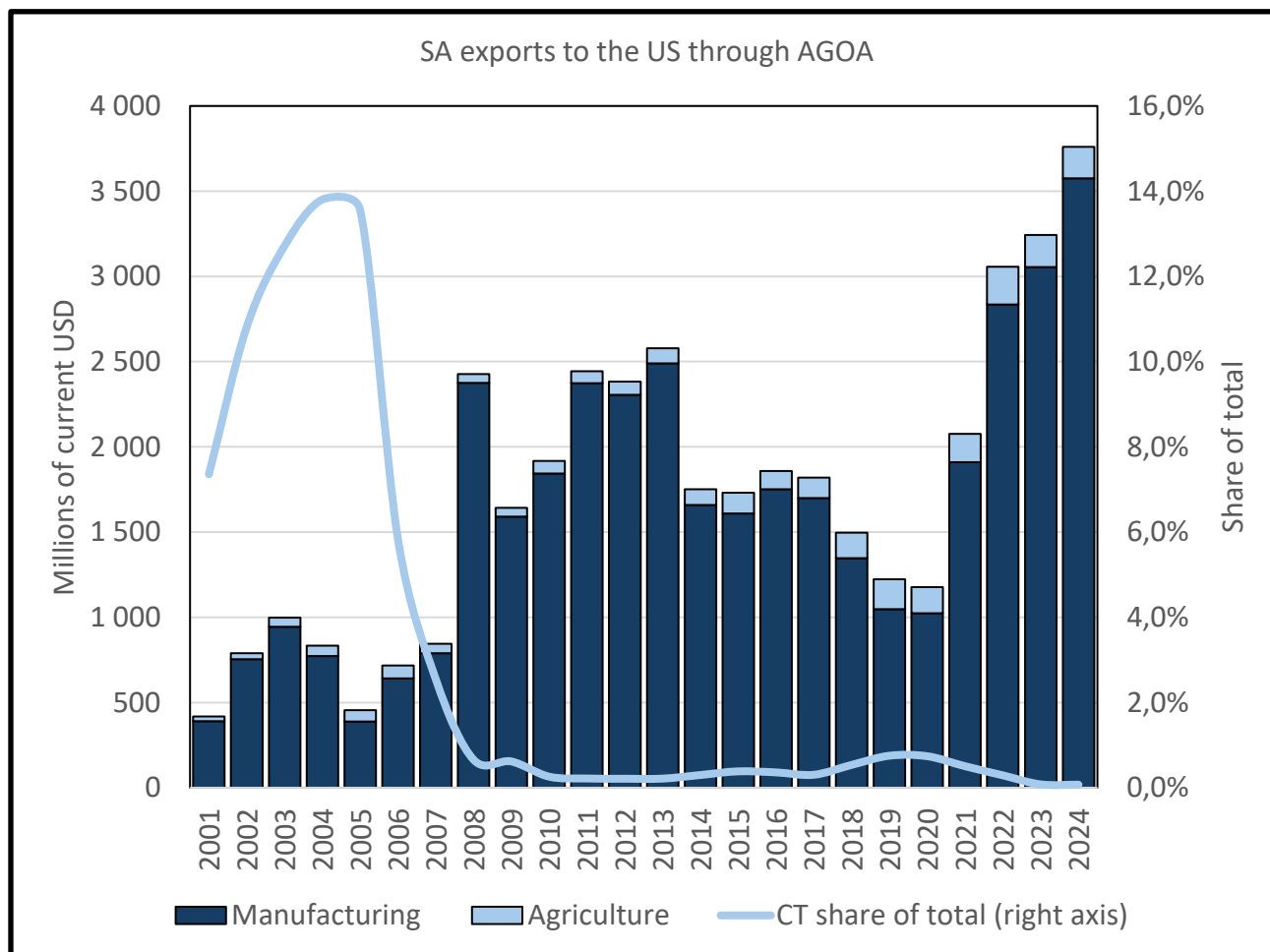
SA imports by product



SA exports by product



Implications of US Tariffs



- Factories relocated from South Africa to neighbouring countries in the early 2000s to take advantage of opportunities offered through AGOA.
 - LDCs were allowed to source textiles from any country to produce clothing.
- AGOA's rules of origin required clothing to be made from US fabric, yarn, or thread or sourced in AGOA SSA countries.
 - LDCs were exempted from this rule.
 - Restricted South Africa's clothing and textile exports to the US.
 - The expiration of the Multi-Fibre Arrangement in 2004, which set quotas on clothing and textile exports, resulted in South Africa being less competitive in the US market.
- Clothing and textiles accounted for 0.07% of South Africa's exports to the US through AGOA in 2024.
 - The loss of AGOA will have a minimal impact on the clothing and textile industries in South Africa.

Foreign Direct Investment

TIPS FDI Tracker

- Minimal FDI projects into South Africa's clothing and textile industries over the last decade.
 - PF Nonwovens invested in a new factory in the Western Cape and later expanded the facility.
 - CMT's investment resulted in the establishment of Pro Textile in KZN.

| INVESTOR FIRMS | PROJECT NAME | INVESTMENT VALUE | PROVINCE | INVESTOR COUNTRY |
|----------------------------------------|---------------------------------------------------|------------------|---------------------------|------------------|
| PF Nonwovens SA | Pegas Nonwovens Atlantis Manufacturing Facilities | R 1.3 billion | Atlantis, Western Cape | Czech Republic |
| Compagnie Mauricienne de Textile (CMT) | Textile manufacturing facility | R390 million | Emnambithi, KwaZulu-Natal | Mauritius |
| PF Nonwovens SA | PF Nonwovens manufacturing facility upgrade | R650 million | Atlantis, Western Cape | Czech Republic |

Key takeaways

- Global trade
 - The US and Europe are the largest importers of clothing and textiles.
 - China remains the world's clothing factory.
 - South Africa is a small player globally.
- South Africa's trade
 - Clothing and textiles are imported from Asia, mainly China.
 - Clothing and textiles are mostly exported to African countries, followed by the EU.
 - One-fifth was exported to Namibia.
- The loss of AGOA will not have a significant impact on the clothing and textile industries.
- There has been minimal FDI in South Africa's clothing and textile industries.

Thank You!

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